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CANNED FRUIT
FCAN 2-64
September 1964

AUSTRALIAN CANNED FRUIT PRODUCTION AND EXPORTS CONTINUE CLIMB IN 1964

The 1964 canned deciduous fruit pack in Australia probably attained an alltime high at an estimated 7.7 million cases (24-2½ basis) as against the previous high of 7.6 million cases in 1962. The 1963 pack consisted of 7.3 million cases. Average production during the 5 years, 1958-62, was a little over 5.5 million cases. These figures cover canned apricots, peaches, pears, and mixed fruit. They do not include the also-important Australian packs of canned pineapple and tropical fruit salad; some data on these, however, are given in this report.

Australian exports of canned deciduous fruit in 1964 are expected to surpass the previous peak attained in 1962 of 4.3 million cases by a substantial margin and possibly exceed 5.1 million cases. In 1963, exports amounted to 4.23 million cases--very slightly less than 4.28 million exported in 1962.

The larger canned pack this year is attributable to maximum utilization for canning rather than to larger fruit crops. At the end of 1963 the Australian industry was carrying relatively large stocks of canned fruit. This, coupled with the expectation of keen foreign competition, caused Australian processors to plan for a smaller pack in 1964 than in 1963, particularly since 1964 fresh fruit production was generally lower. However, when it became known that South African and Argentine peach packs would be substantially smaller than in 1963, the outlook changed drastically. Export prices increased and Australian canners scrambled to process every piece of fruit that was fit to put into a can.

As a result, record-large packs are estimated for three of the four deciduous items--peaches, pears, and mixed fruit. The 1964 peach pack is estimated at 3.45 million cases, the pear pack 3.2 million cases, and the mixed fruit pack 0.62 million cases. The canned apricot pack, however, was down sharply from the past two seasons, mainly because of lower yields of canning-quality fruit in Victoria and the Murrumbidgee Irrigation Area of New South Wales, owing to brown rot and shot hole disease in the former and splitting of fruit following heavy December rains in the latter. Also, in South Australia there was considerable diversion of apricots to drying.

CANNED FRUIT: Australian production and exports,
average 1958-62, annual 1961-64

Canned Fruit	:Average : :1958-62 :	1960	1961	1962	1963	:Forecast : 1964
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	:cases 1/	:cases 1/	:cases 1/	:cases 1/	:cases 1/	:cases 1/
Production:	:	:	:	:	:	:
Apricots.....	634	576	334	918	846	443
Mixed fruit.....	264	201	190	441	442	616
Peaches.....	2,196	2,045	1,675	3,259	3,339	3,450
Pears.....	2,459	2,415	2,621	3,006	2,653	3,210
Total deciduous.....	5,553	5,237	4,820	7,624	7,280	7,719
Pineapple.....	1,090	1,107	800	1,052	885	---
Tropical fruit salad..	456	534	383	567	580	---
Grand total.....	7,099	6,878	6,003	9,243	8,745	---
Exports:	:	:	:	:	:	:
Apricots.....	281	278	76	318	201	190
Mixed fruit.....	104	99	121	158	201	350
Peaches.....	1,122	1,100	793	1,564	1,703	2,200
Pears.....	1,929	2,016	1,871	2,242	2,122	2,400
Total deciduous.....	3,436	3,493	2,861	4,282	4,227	5,140
Pineapple.....	522	666	172	418	313	---
Tropical fruit salad..	51	79	28	74	149	---
Grand total.....	4,009	4,238	3,061	4,774	4,689	---

1/ Cases of equivalent 24 No. 2½ cans.

The trend in the canned apricot pack--contrary to that of the other canned deciduous items--has been downward. In the 5 years, 1955-59, production averaged 755,000 cases, while in the most recent 5 years, 1960-64, it averaged 623,000 cases, a decline of 8 percent. Peak production was attained in 1954 when 1,271,000 cases were packed. In the 8 years, 1951 through 1958, the pack never fell below the 500,000-case level; but in 3 of the last 6 years it has been less. The bearing acreage of apricots has fluctuated a

little but has certainly not expanded to the extent that peaches and pears have, while nonbearing apricot acreage has actually been declining. Also, there has been some diversion from canning to drying, caused in part by the keen foreign competition encountered by Australian canned apricot exports. This has caused Australian canners to compete for the internal market, and as a result, domestic consumption has greatly expanded both in volume and percentage of the pack. Gains in domestic sales, though, have been offset by lower profits.

Bearing acreage has risen sharply between 1958-59 and 1962-63 for peaches, moderately for pears. Although this increase applies to most fruits, it has been most striking for peaches and pears both in absolute and relative terms. The expansion in the bearing acreage of peaches and pears should abate, since new plantings, though still considerable, are declining.

SELECTED FRUIT: Total Australian acreage,
1958-59 through 1962-63

Kind of fruit	1958-59	1959-60	1960-61	1961-62	1962-63
	1,000	1,000	1,000	1,000	1,000
	acres	acres	acres	acres	acres
<u>Bearing area</u>					
Apples.....	65.6	65.8	65.9	65.9	67.9
Apricots.....	9.5	9.4	9.2	9.4	9.9
Cherries.....	3.2	3.2	3.3	3.3	3.5
Nectarines.....	.9	.9	.9	.8	.8
Peaches.....	14.3	14.7	15.1	19.7	22.2
Pears.....	17.8	17.9	17.8	18.5	20.0
Plums.....	4.7	4.8	4.7	4.8	5.1
Prunes.....	3.5	3.5	3.5	3.5	3.4
Pineapple.....	10.0	9.5	8.1	7.3	7.2
<u>Total area</u>					
Apples.....	83.6	85.3	86.9	87.6	91.4
Apricots.....	12.1	12.1	11.9	11.5	11.8
Cherries.....	4.4	4.6	4.8	4.9	5.1
Nectarines.....	1.1	1.1	1.1	1.1	1.1
Peaches.....	25.2	26.4	26.9	29.6	30.2
Pears.....	23.0	23.7	23.9	25.3	26.0
Plums.....	6.2	6.3	6.3	6.5	6.6
Prunes.....	4.2	4.2	4.3	4.4	4.2
Pineapple.....	14.8	12.6	11.1	10.5	10.5

Source: The Fruit Growing Industry, Australia, No. 19, Commonwealth Bureau of Census and Statistics, Canberra, May 1964.

The relative importance of the various fruits, in terms of tonnage of fresh production can be seen from the following table. Also, an upward trend in practically all categories of deciduous fruits is apparent.

SELECTED FRUITS: Australian production,
annual 1959-63

Kind of fruit	: 1959	: 1960	: 1961	: 1962	: Preliminary : 1963
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: Short	: Short	: Short	: Short	: Short
	: <u>tons</u>	: <u>tons</u>	: <u>tons</u>	: <u>tons</u>	: <u>tons</u>
Apples.....	273.9	295.4	325.2	359.7	385.3
Apricots.....	34.3	37.1	31.8	44.8	45.9
Cherries.....	6.2	7.4	6.5	8.5	7.3
Nectarines.....	3.0	2.9	2.8	3.2	3.0
Peaches.....	58.3	65.6	55.6	89.1	90.1
Pears.....	106.6	118.5	120.6	147.8	127.5
Plums and prunes.....	23.3	26.2	27.0	27.9	30.2
Pineapple.....	109.1	99.6	81.8	82.2	86.6

Source: The Fruit Growing Industry, Australia, No. 19, Commonwealth Bureau of Censuses and Statistics, Canberra, May 1964.

Victoria is by far the leading State in acreage and production of canning peaches and canning pears. In the case of canning pears in particular, Victoria is all-dominant. Although South Australia leads in apricot acreage, Victoria is also the top State for production of canned apricots, with South Australia next and New South Wales third. New South Wales is the second most important State in canning peach acreage and production. The other States, such as Queensland, Western Australia, and Tasmania produce but minor quantities of these three canned fruits.

The dynamism of the fruit industry of Australia is well illustrated by the Census statistics of 1960-61 on tree numbers according to age groups. In Victoria, for instance, 64 percent of the Clingstone peach trees were under 5 years old and 11 percent were 5 to 9 years old. In other words, 75 percent of the Clingstone trees were yet to come into full-bearing. The comparable figure for New South Wales was 66 percent and for South Australia 77 percent. In the case of apricots, 41 percent of the trees in Victoria, 52 percent in South Australia, and 45 percent in New South Wales were still to come into full production. For Bartlett pears the percentages were equally impressive: 41 percent in Victoria, 54 percent in South Australia and 38 percent in New South Wales.

SELECTED FRUIT: Australian acreage by state in 1962-63

Kind of fruit	New South Wales	Victoria	Queensland	South Australia	Western Australia	Tasmania	Total
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres
<u>Bearing area</u>							
Apples.....	12.6	15.8	8.2	4.9	10.9	15.5	67.9
Apricots.....	1.7	3.5	.3	3.6	.3	.5	9.9
Cherries.....	1.7	1.3	<u>1/</u>	.5	<u>1/</u>	<u>1/</u>	3.5
Nectarines.....	.4	.1	<u>1/</u>	.2	.1	<u>1/</u>	.8
Peaches:							
Canning.....	3.7	8.3	1.4	3.7	.7	<u>1/</u>	22.2
Other.....	2.7	1.7	--	--	--	--	--
Pears:							
Canning.....	1.0	7.1	.4	1.6	.8	.3	20.0
Other.....	1.7	5.9	--	--	--	1.2	--
Plums.....	1.2	1.5	1.2	.3	.8	.1	5.1
Prunes.....	2.5	.3	--	.6	<u>1/</u>	<u>1/</u>	3.4
Pineapple.....	.1	--	7.1	--	--	--	7.2
<u>Total area</u>							
Apples.....	18.2	22.7	12.3	5.9	14.9	17.4	91.4
Apricots.....	2.1	4.0	.4	4.5	.3	.5	11.8
Cherries.....	2.7	1.8	<u>1/</u>	.6	<u>1/</u>	<u>1/</u>	5.1
Nectarines.....	.4	.2	.1	.2	.2	<u>1/</u>	1.1
Peaches:							
Canning.....	4.5	11.9	1.9	4.8	1.0	.1	30.2
Other.....	3.5	2.5	--	--	--	--	--
Pears:							
Canning.....	1.3	10.0	.9	2.1	1.1	.3	26.0
Other.....	2.1	6.9	--	--	--	1.3	--
Plums.....	1.7	1.9	1.4	.4	1.1	.1	6.6
Prunes.....	3.1	.3	--	.8	<u>1/</u>	<u>1/</u>	4.2
Pineapple.....	.2	--	10.3	--	--	--	10.5

1/ Less than 100 acres.

Source: The Fruit Growing Industry, Australia, No. 19, Commonwealth Bureau of Census and Statistics, Canberra, May 1964.

CANNED DECIDUOUS FRUITS: Australian production by state,
average 1931-35 and 1951-55,
annual 1959-63

Kind of fruit	Queensland	New South Wales	Victoria	South Australia	Western Australia	Tasmania	Total
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	<u>cases</u>	<u>cases</u>	<u>cases</u>	<u>cases</u>	<u>cases</u>	<u>cases</u>	<u>cases</u>
Canned apricots							
Average:							
1931-35.....	--	57	96	8	--	39	200
1951-55.....	42	148	353	262	1	20	826
Annual:							
1959.....	27	174	144	98	3	3	449
1960.....	23	57	433	49	1	13	576
1961.....	27	64	96	140	4	3	334
1962.....	42	124	504	239	2	7	918
1963.....	34	144	444	217	3	4	846
Canned peaches							
Average:							
1931-35.....	--	250	618	12	--	--	880
1951-55.....	31	574	1,280	92	--	--	1,977
Annual:							
1959.....	12	371	1,033	293	1	--	1,710
1960.....	35	517	1,145	347	1	--	2,045
1961.....	28	342	858	444	3	--	1,675
1962.....	36	802	1,756	659	6	--	3,259
1963.....	56	790	1,881	602	10	--	3,339
Canned pears							
Average:							
1931-35.....	--	18	305	31	--	40	394
1951-55.....	9	95	1,209	98	1	36	1,448
Annual:							
1959.....	4	76	1,829	62	--	51	2,022
1960.....	--	98	2,155	114	--	48	2,415
1961.....	4	130	2,358	76	1	52	2,621
1962.....	13	102	2,689	131	3	68	3,006
1963.....	21	154	2,375	49	--	54	2,653
Canned mixed fruit							
Average:							
1951-55.....	8	2	124	5	--	--	139
Annual:							
1959.....	--	3	149	26	--	--	178
1960.....	7	13	145	36	--	--	201
1961.....	10	8	127	45	--	--	190
1962.....	64	41	268	68	--	--	441
1963.....	29	42	294	77	--	--	442
Total deciduous fruit							
Average:							
1931-35.....	--	325	1,019	51	--	79	1,474
1951-55.....	90	819	2,966	457	2	56	4,390
Annual:							
1959.....	43	624	3,155	479	4	54	4,359
1960.....	65	685	3,878	546	2	61	5,237
1961.....	69	544	3,439	705	8	55	4,820
1962.....	155	1,069	5,217	1,097	11	75	7,624
1963.....	140	1,130	4,994	945	13	58	7,280

Source: Thirty-Eighth Report of the Australian Canned Fruits Board, Canberra, April 1964.

CANNING PEACHES, APRICOTS, AND PEARS: Trees in Australia by
number and age, according to census data, 1960-61

Age group by years	Victoria		New South Wales		South Australia		Total	
	Thousands	Percent	Thousands	Percent	Thousands	Percent	Thousands	Percent
<u>Clingstone Peaches</u>								
Under 5.....	789.2	64	217.7	47	181.5	43	1,188.4	57
5 - 9.....	135.2	11	88.1	19	137.6	34	360.9	17
10 - 14.....	85.0	7	14.5	3	63.3	16	162.8	8
15 - 19.....	92.8	8	39.8	9	14.7	4	147.3	7
20 - 24.....	72.1	6	55.6	12	2.4	1	130.1	6
25 and over.....	50.8	4	47.1	10	8.8	2	106.7	5
Total.....	1,225.1	100	462.8	100	408.3	100	2,096.2	100
<u>Apricots</u>								
Under 5.....	75.6	27	31.6	20	70.3	25	177.5	25
5 - 9.....	39.6	14	38.2	25	77.2	27	155.0	22
10 - 14.....	42.1	15	18.7	12	61.5	22	122.3	17
15 - 19.....	42.6	15	14.3	9	23.1	8	80.0	11
20 - 24.....	33.2	12	18.6	12	8.6	3	60.4	8
25 and over.....	48.1	17	33.0	22	41.0	15	122.1	17
Total.....	281.2	100	154.4	100	281.7	100	717.3	100
<u>Barlett Pears</u>								
Under 5.....	216.4	27	14.7	26	20.5	23	251.6	27
5 - 9.....	109.1	14	7.1	12	27.6	31	143.8	15
10 - 14.....	31.8	4	3.8	7	15.8	18	51.4	5
15 - 19.....	47.5	6	5.8	10	4.1	5	57.4	6
20 - 24.....	62.0	8	13.0	23	2.0	2	77.0	8
25 - 29.....	69.8	9	9.7	17	2.7	3	82.2	9
30 and over.....	260.0	32	3.4	5	17.1	18	280.5	30
Total.....	796.6	100	57.5	100	89.8	100	943.9	100

Source: The Canning Fruit-Growing Industry, An Economic Survey, Bureau of Agricultural Economics, Canberra, 1961.

Beginning stocks of canned fruits, on January 1, 1964, compared with a year earlier were up for apricots (200,000 vs. 156,000 cases), peaches (553,000 vs. 417,000 cases), and mixed fruit (140,000 vs. 98,000 cases). Only pear stocks declined--from 82,000 cases to a virtually negligible 13,000 cases.

In view of the small 1964 apricot pack, apricot stocks at the end of 1964 are likely to be much smaller than carried in. Peach stocks should also be smaller at the end of the year in consequence of anticipated heavy export movement. On the other hand, pear stocks at the end of 1964 may well be quite a bit larger than at the beginning in view of the heavy pack and sharp export competition from other countries. The carryout of canned mixed fruit may also be larger than the carryin.

Exports in 1963 were record large for canned peaches and mixed fruit, amounting to 1,703,000 cases and 201,000 cases respectively. Exports of canned pears and apricots were lower in 1963 than in 1962, amounting to 2,122,000 cases for pears and 201,000 cases for apricots.

In 1964, exports of canned peaches will likely exceed by a substantial margin the record 1,703,000 cases shipped out in 1963. Reduced South African and Argentine export availabilities should enable Australian processors to achieve another new high in peach exports. Likewise, mixed fruit exports should register a further gain over the previous all-time high.

CANNED APRICOTS: Australia, supply and distribution
1961, 1962, 1963, and forecast 1964

Item	1961	1962	1963	Forecast 1964
	1,000	1,000	1,000	1,000
	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>
Supply:				
Beginning stocks, January 1...	13	5	156	200
Production.....	334	918	846	443
Total.....	347	923	1,002	643
Distribution:				
Exports.....	76	318	201	190
Domestic consumption.....	266	449	601	450
Ending stocks, December 31....	5	156	200	3
Total.....	347	923	1,002	643

1/ Cases of equivalent 24 No. 2½ cans.

CANNED PEACHES: Australia, supply and distribution
1961, 1962, 1963, and forecast 1964

Item	1961	1962	1963	Forecast 1964
	1,000	1,000	1,000	1,000
	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>	<u>cases 1/</u>
Supply:				
Beginning stocks, January 1...	159	87	417	553
Production.....	1,675	3,259	3,339	3,450
Total.....	1,834	3,346	3,756	4,003
Distribution:				
Exports.....	793	1,564	1,703	2,200
Domestic consumption.....	954	1,365	1,500	1,600
Ending stocks, December 31....	87	417	553	203
Total.....	1,834	3,346	3,756	4,003

1/ Cases of equivalent 24 No. 2½ cans.

CANNED PEARS: Australia, supply and distribution
1961, 1962, 1963, and forecast 1964

Item	: 1961	: 1962	: 1963	: Forecast 1964
	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>cases 1/</u>	: <u>cases 1/</u>	: <u>cases 1/</u>	: <u>cases 1/</u>
Supply:				
Beginning stocks, January 1...	58	71	82	13
Production.....	2,621	3,006	2,653	3,210
Total.....	2,679	3,077	2,735	3,223
	:	:	:	:
Distribution:				
Exports.....	1,871	2,242	2,122	2,300
Domestic consumption.....	737	753	600	750
Ending stocks, December 31...	71	82	13	173
Total.....	2,679	3,077	2,735	3,223

1/ Cases of equivalent 24 No. 2½ cans.

CANNED MIXED FRUIT 1/: Australia, supply and distribution
1961, 1962, 1963, and forecast 1964

Item	: 1961	: 1962	: 1963	: Forecast 1964
	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>cases 2/</u>	: <u>cases 2/</u>	: <u>cases 2/</u>	: <u>cases 2/</u>
Supply:				
Beginning stocks, January 1...	16	10	98	140
Production.....	190	441	442	616
Total.....	206	451	540	756
	:	:	:	:
Distribution:				
Exports.....	121	158	201	300
Domestic consumption.....	75	195	199	250
Ending stocks, December 31...	10	98	140	206
Total.....	206	451	540	756

1/ Canned composite packs, including fruit salad, fruit cocktail, and diced two-fruit mixtures.

2/ Cases of equivalent 24 No. 2½ cans.

The predominant item in the mixed fruit pack is the so-called "two-fruits" (peaches and pears), followed by fruit cocktail with fruit salad ranking a poor third. In 1963, though, less fruit cocktail was put up than in the previous year while there were gains in the two-fruits and fruit salad packs.

MIXED FRUIT PACK: Australia, composition 1956-64

Year	: Fruit : cocktail	: Fruit : salad	: Two-fruits	: Total
	: 1,000	: 1,000	: 1,000	: 1,000
	: cases 1/	: cases 1/	: cases 1/	: cases 1/
1956.....	: 36	: 19	: 107	: 162
1957.....	: 151	: 26	: 138	: 315
1958.....	: 96	: 34	: 179	: 309
1959.....	: 61	: 13	: 104	: 178
1960.....	: 47	: 36	: 118	: 201
1961.....	: 77	: 18	: 95	: 190
1962.....	: 150	: 39	: 252	: 441
1963.....	: 117	: 55	: 270	: 442
1964 forecast.....	: -	: -	: -	: 616

1/ Cases of equivalent 24 No. 2½ cans.

Australian consumption of canned deciduous fruit has shown a remarkable gain during the past decade. Consumption of the four items which undoubtedly represent the bulk of the canned deciduous fruits in Australia more than doubled between 1955 and 1963. This increase--128 percent--represents a considerable per capita increase since population rose but 19 percent during this period.

FOUR CANNED DECIDUOUS FRUIT ITEMS: Rate of growth of
Australian consumption and population 1955-63

Year	: Quantity	: Increase	: Total	: Increase
	: 1,000	: over 1955	: population	: over 1955
	: cases 1/	: Percent	: Thousands	: Percent
1955.....	: 1,274	: ---	: 9,200	: --
1956.....	: 1,325	: 4	: 9,426	: 2
1957.....	: 1,836	: 44	: 9,640	: 5
1958.....	: 1,671	: 31	: 9,842	: 7
1959.....	: 1,646	: 29	: 10,056	: 9
1960.....	: 2,021	: 59	: 10,275	: 12
1961.....	: 2,032	: 59	: 10,508	: 14
1962.....	: 2,762	: 117	: 10,705	: 16
1963 Preliminary.....	: 2,900	: 128	: 10,916	: 19

1/ Cases of equivalent 24 No. 2½ cans.

Source: Consumption data except 1963--Thirty-Eighth Report of the Australian Canned Fruits Board, Canberra, April 1964. Population--Monthly Bulletin of Statistics, United Nations, February 1964.

CANNED FRUIT: Australia, minimum opening export prices
to the United Kingdom (c.i.f. U.K. port), 1959-64

Fruit and pack style	Price per dozen 2½'s		
	Fancy	Choice	Standard
	U.S. dollars	U.S. dollars	U.S. dollars
Apricots:			
Halves			
1959.....	3.29	3.08	2.87
1960.....	3.15	2.94	2.80
1961.....	3.50	3.29	3.15
1962.....	3.50	3.29	3.15
1963.....	3.29	3.08	2.94
1964.....	3.43	3.22	3.08
Peaches:			
Clingstones			
Halves and slices			
1959.....	3.64	3.43	3.22
1960.....	3.36	3.15	3.01
1961.....	3.50	3.29	3.15
1962.....	3.36	3.15	3.01
1963.....	3.22	3.01	2.87
1964.....	3.43	3.22	3.08
Freestones			
Halves and slices			
1959.....	3.15	2.94	2.73
1960.....	3.12	2.90	2.76
1961.....	3.26	3.04	2.90
1962.....	3.12	2.90	2.76
1963.....	3.01	2.80	2.66
1964.....	3.08	2.87	2.73
Pears (Bartletts):			
Halves and quarters			
1959.....	3.71	3.50	3.29
1960.....	3.64	3.43	3.29
1961.....	3.71	3.50	3.36
1962.....	3.57	3.36	3.22
1963.....	3.50	3.29	3.15
1964.....	3.57	3.36	3.22
Fruit cocktail:			
1959.....	4.20	3.99	3.78
1960.....	3.92	3.71	3.57
1961.....	4.06	3.85	3.71
1962.....	3.92	3.71	3.57
1963.....	3.78	3.57	3.43
1964.....	4.06	3.85	3.71
Two-fruit:			
1959.....	3.57	3.36	3.15
1960.....	3.36	3.15	3.01
1961.....	3.50	3.29	3.15
1962.....	3.36	3.15	3.01
1963.....	3.22	3.01	2.87
1964.....	3.43	3.22	3.08

Source: Australian Canned Fruits Board.

Opening minimum export prices (c.i.f. U.K. port) for 1964, effective March 25, were higher than opening 1963 minimums for practically all items. The increases ranged from 2 percent for pears and freestone peaches (7 cents per dozen) to 8 percent for fruit cocktail (28 cents per dozen). As a result of these increases, the 1964 opening prices approximated the opening 1962 levels. The 1964 minimum prices were subsequently increased by a further 7 cents per dozen for all fruit falling into the fancy grade.

As reported in an earlier circular, Australian quality designations were realigned beginning with the 1963 pack. The previous designations "choice," "standards," and "seconds" were renamed "fancy," "choice," and "standard." This was done to bring Australian designations into line with those of other major producing countries, including the United States.

Using the new designations, the Australians have packed out the following percentages of the total pack in each of the three export grades and the domestic grade 1/:

	<u>1959</u>	<u>1960</u>	<u>1961</u>	<u>1962</u>	<u>1963</u>
	Percent	Percent	Percent	Percent	Percent
Fancy.....	6.6	4.4	6.0	6.9	4.3
Choice.....	67.3	63.2	59.1	56.9	56.6
Standard.....	8.3	9.2	7.2	7.0	10.9
Domestic.....	17.8	23.2	27.7	29.2	28.2

Minimum grower prices for the 1964 crop of peaches were set at a somewhat lower level than in 1963 when it was not yet clear that the export outlook would be bright. The Fruit Industry Sugar Concession Committee also set the minimum grower price for Packham's Triumph pears at a somewhat lower level than in 1963 though the Bartlett minimum price remained unchanged. The Committee, a statutory authority whose main function is the distribution of certain sugar rebates (for sugar used in export products), requires that fruit processors must pay the growers not less than these prices to qualify for rebates. These price minimums apply to all canning fruit, regardless of whether they are for export or the domestic market.

1/ Source: Australian Canned Fruits Board.

CANNING FRUIT: Australia, minimum grower prices
per short ton 1/ for first-quality fruit,
average 1958-62 and 1960-64 seasons

Fruit	: Average : : 1958-62 :	: 1960 :	: 1961 :	: 1962 :	: 1963 :	: 1964
	: U.S. : : <u>dol.</u> :	: U.S. : : <u>dol.</u> :	: U.S. : : <u>dol.</u> :	: U.S. : : <u>dol.</u> :	: U.S. : : <u>dol.</u> :	: U.S. : : <u>dol.</u> :
Apricots.....	76	: 60	: 76	: 86	: 86	: 86
Peaches, cling, clear center...	92	: 80	: 88	: 88	: 88	: 82
Peaches, cling, other.....	88	: 76	: 84	: 84	: 84	: 78
Peaches, freestone.....	60	: 52	: 60	: 60	: 60	: 56
Pears, Bartlett.....	83	: 76	: 84	: 84	: 84	: 84
Pears, Packham's Triumph.....	66	: 60	: 68	: 68	: 68	: 64

1/ Delivered to either the grower's railroad siding or to the cannery door.

There have been some interesting Australian export trends such as the remarkable gain in canned peach and pear exports. The 1963 canned peach exports of 1,703,000 cases were 41 percent above the 5-year average (1954-58). For canned pears, the 1963 exports of 2,122,000 cases were 45 percent above the average; canned mixed fruit exports in 1963 of 201,000 cases were more than double the average volume. On the other hand, canned apricot exports have been declining. In 1963, for example, despite a fairly large pack, they were but 34 percent of the average volume. For these deciduous items in aggregate, exports in 1963 were 26 percent larger than average, a performance which will probably be surpassed in 1964.

The two nondeciduous items display opposing export trends; i.e., pineapple shipments have been going down and in 1963 were only about half of average, while shipments of tropical fruit salad have been rising and in 1963 were more than $2\frac{1}{2}$ times as large as average.

Australian exports of all canned fruit--deciduous and nondeciduous--totaled 4,689,000 cases in 1963. Although slightly less than the record volume shipped out in 1962, the 1963 export total was 672,000 cases, or 17 percent larger than average.

As for Australia's export markets, the United Kingdom continues as far and away the most important. During the 5 years 1959-63, the United Kingdom took 94.9 percent of Australia's canned deciduous exports. This was very similar to the percentage sold to the United Kingdom during the preceding 5 years, 1954-58. Though canned deciduous exports to Canada increased substantially in 1963, they only accounted for 3.7 percent of the exports. This gain was at least partly due to the reduced offerings and higher prices of U.S. canned fruit in 1963. A larger U.S. pack coupled with higher Australian-Canadian ocean freight rates in 1964 will make it difficult for Australia to increase or even maintain its 1963 sales in Canada.

Australian canned fruit, of course, enjoys preferential tariff treatment in the United Kingdom and Canada, as in other British Commonwealth countries.

CANNED FRUITS: Australia, exports by country of destination,
average 1934-38 and 1954-58, and annual 1959-63

Canned fruit type and destination	Average		1959	1960	1961	1962	Preliminary 1963
	1934-38	1954-58					
	1,000 cases 2/	1,000 cases 2/	1,000 cases 2/	1,000 cases 2/	1,000 cases 2/	1,000 cases 2/	1,000 cases 2/
<u>Apricots</u>							
Canada.....	8	7	17	9	1	27	25
New Zealand.....	26	22	2	2	---	1	---
United Kingdom.....	148	541	202	248	67	275	157
Other.....	4	18	46	19	8	15	19
Total.....	186	588	267	278	76	318	201
<u>Peaches</u>							
Canada.....	53	14	8	7	7	16	70
New Zealand.....	56	50	10	8	3	---	---
United Kingdom.....	675	1,104	939	1,051	759	1,505	1,537
Other.....	11	42	36	34	24	43	96
Total.....	795	1,210	993	1,100	793	1,564	1,703
<u>Pears</u>							
Canada.....	5	8	9	5	15	28	55
New Zealand.....	8	8	---	---	---	---	---
United Kingdom.....	467	1,412	1,751	1,980	1,828	2,149	1,999
Other.....	8	38	30	31	28	65	68
Total.....	488	1,466	1,790	2,016	1,871	2,242	2,122
<u>Mixed fruit 3/</u>							
Canada.....	4/	---	---	---	---	3	6
New Zealand.....	4/	11	1	1	---	---	---
United Kingdom.....	4/	83	59	93	116	140	170
Other.....	4/	3	3	5	5	15	25
Total.....	4/	97	63	99	121	158	201
Total canned deciduous fruit..	1,469	3,361	3,113	3,493	2,861	4,282	4,227
<u>Pineapple</u>							
Canada.....	4/	70	142	159	65	106	122
New Zealand.....	4/	82	84	98	32	45	71
United Kingdom.....	4/	466	553	332	69	250	102
Other.....	4/	10	176	77	6	17	18
Total.....	4/	628	955	666	172	418	313
<u>Tropical fruit salad</u>							
Canada.....	4/	3	21	14	5	20	81
New Zealand.....	4/	21	9	13	5	---	---
United Kingdom.....	4/	2	26	37	1	23	39
Other.....	4/	2	1	15	17	31	29
Total.....	4/	28	57	79	28	74	149
<u>Total canned deciduous, pine- apple, and fruit salad</u>							
Canada.....	66	102	197	193	93	200	359
New Zealand.....	90	194	105	122	40	46	71
United Kingdom.....	1,290	3,608	3,530	3,741	2,840	4,342	4,004
Other.....	23	113	293	182	88	186	255
Grand total.....	1,469	4,017	4,125	4,238	3,061	4,774	4,689

1/ Year beginning July 1. 2/ Cases of equivalent 24 No. 2½ cans. 3/ Composite fruit packs of canned fruit cocktail, canned fruit salad (other than tropical fruit salad) and canned two-fruit. 4/ Negligible.

Source: Prewar--official trade statistics; postwar--Australian Canned Fruits Board.

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